THE MARKET FOR LIVE THEATRE IN THE TORONTO-HAMILTON-OSHAWA REGION

NOW AND THEN

Ontario Ministry of Tourism & Recreation
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Ontario

TAMS
Travel Activities & Motivation Survey

INTRODUCTION

During the fall of 1999 and the winter of 2000, the Ministry of Tourism and Recreation in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

Subsequently, the Ministry projected the 1999/2000 databases to the year 2026 using population projections from Statistics Canada and the US Bureau of Census.

This report presents a profile of the live theatre market in the Toronto-Hamilton-Oshawa (THO) area at the end of 1999 and some estimates on how this market will change in 2026[1].

TAMS collected data not only on Canadian residents' travel habits, but also on their habits at home when they are not travelling. A list of activities was presented and respondents were asked: "***I'd like to get an idea of the things you personally do for day-to-day recreation and entertainment when you are not travelling. In the past year or so,...did you participate frequently, occasionally, rarely or did not participate at all in the following activities***". Going to live theatre was one of the activities on the list.

The total sample for the THO region is 3,651, while the sample of those THO residents who said that they go to live theatre frequently or occasionally when they are at home is 1,444:

		Theatre Goers	Total Sample
Toronto CMA	=	748	1,730
Hamilton CMA	=	350	1,004
Oshawa CMA	=	346	917
Total	=	1,444	3,651

Since the Toronto residents constitute 52% of the sample, the results presented in the following pages are heavily influenced by their behaviour.

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[1] For details on the methodology as well as an overview of how the total US and Canadian markets will look like in 2026 please visit our web site at: www.tourism.gov.on.ca and click on the link entitled Travel Activities and Motivation Survey. The two reports are entitled "Aging the Canadian Market" and "Aging the US market".

EXECUTIVE SUMMARY

- A total of 1,761,195 residents of the Toronto-Hamilton-Oshawa (THO) region aged 18 years and over indicated that when they are at home they go to the theatre on a frequent or occasional basis. That's a bit less than 41% of the region's total population of 18 years and older.

- Of the 1.7 million theatre-goers, 85% resided in Toronto, 10% in Hamilton and 5% in Oshawa. This level of participation represents an incidence of participation a bit over 41% for Toronto, 35% for Hamilton and 37% for Oshawa, reflecting in a way the fact that most live theatre productions are carried out in Toronto.

- Going to restaurants (other than fast food restaurants) and exercising either at home or in a fitness club are at the top of the theatre-goers' complementary activities they engage in on a frequent or occasional basis, followed by swimming in swimming pools or natural bodies of water and going to music concerts. On a frequent basis, however, restaurants and exercising is followed by gardening and swimming. As such, locating near these types of facilities may prove profitable to theatres, especially during the winter when the inconvenience of going from parking lot to parking lot may be overwhelming.

- The average THO theatre-goer is 43 years of age (as opposed to 44 for other THO residents), lives in a household that is smaller in size and has fewer children under 18 years of age than that of other THO residents and is much more educated and richer than other THO residents.

- Given their income and education a higher proportion of THO theatre-goers travels than other THO residents (87% vs. 63%).

- When they are on an overnight trip, THO theatre-goers seek similar types of activities to do as when they are at home, i.e., they dine in "interesting" restaurants, shop, go to the theatre, art galleries and museums.

- THO theatre-goers are avid readers of newspapers, both the weekend and weekday editions. They also read community newspapers and the travel section of weekend newspapers. Late shows such as movies, drama and evening sitcoms are the shows most frequently watched on TV by THO theatre-goers. However, the incidence of TV watching is not as high as that of newspapers readership.

- Almost half of the THO theatre-goers belong to the CAA club and over a third of them belong to a sports or fitness club. As such, these clubs represent cost-efficient alternatives to TV for reaching THO's theatre-goers.

- By the year 2026, the THO region is forecast to have 65% more residents aged 18 years or older than it did at the end of 1999. Those who would frequently or occasionally go to the theatre while not travelling are expected to increase by 77%, while other THO residents are expected to increase by 56%. As such, both the absolute and relative size of the theatre-goers will increase.

- By the year 2026, the average age of THO theatre-goers will increase by 14% from 43 years in 1999 to 49 years in 2026. Although in absolute terms the number of THO theatre-goers with children less than 18 years of age will increase over the period under consideration, the proportion of the theatre-goers households with children less than 18 years of age will decline from 35% in 1999 to 25% in 2026.

- In 2026, the activities that theatre-goers will participate in at home and while on overnight trips will be of a less strenuous or outdoors nature. As such, activities of a cultural/entertainment nature will increase in importance for this group, while outdoors and strenuous activities will decline.

PART 1: THE PRESENT

How big is this market? A total of 1,761,195 residents of the Toronto-Hamilton-Oshawa (THO) region aged 18 years and over indicated that when they are at home they go to live theatre on a frequent or occasional basis. That's a bit less than 41% of the region's total population of 18 years and older.

Of the 1.7 million theatre-goers, 85% resided in Toronto, 10% in Hamilton and 5% in Oshawa, reflecting in a way the fact that most live theatre productions are carried out in Toronto. This level of participation represents a population incidence for attending live theatre of a bit over 41% for Toronto, 35% for Hamilton and 37% for Oshawa - a fact that appears to indicate that live theatre is an important activity for the residents of all three cities.

Table 1: Other Day-To-Day Activities Engaged in By THO's Theatre-Goers

Other Activities Engaged In:	Frequently or Occasionally	Frequently
Live Theatre	100%	21%
Restaurants other than fast food	94%	47%
Exercise at home or at fitness clubs	78%	50%
Swim in pools or natural bodies of water	65%	30%
Music concert (Jazz, classical, rock)	62%	15%
Go to a park for picnic or day outing	60%	23%
Gardening	56%	36%
Museum	53%	9%
Zoo or botanical garden	53%	7%
Art gallery or art show	52%	11%
Dancing	50%	15%
Go to professional sport events	49%	12%
Visit amusement or theme parks	48%	7%
Camping/hiking/backpacking	41%	16%
Biking	46%	20%
Ice skating	35%	15%
Golf	33%	16%

Table 1 shows other activities that these THO theatre-goers engage in while at home. The first column of the table shows the proportion of THO's theatre-goers who participate in the activities of the left-hand column on a frequent or occasional basis, while the second numerical column shows the proportion of theatre-goers who participate in these activities on a frequent basis when not travelling. Going to restaurants (other than fast food restaurants) and exercising either at home or in

a fitness club are at the top of the theatre-goers' complementary activities they engage in on a frequent or occasional basis, followed by swimming in swimming pools or natural bodies of water and going to music concerts. On a frequent basis, however, restaurants and exercising is followed by gardening and swimming.

Table 1 also shows that only 21% of the THO theatre-goers are theatre-lovers (that is, they go to the theatre on a frequent basis when not travelling).

Frequency of travel and destinations visited: Over 87% of the THO theatre-goers had taken an overnight trip anywhere in the world during the 2 years preceding the study compared to 63% for other THO residents.

Table 2: Places Visited while on Overnight Leisure Trips in Past 2 Years

	THO Theatre-Goers	Other THO Residents
Newfoundland	2%	1%
PEI	4%	2%
Nova Scotia	7%	4%
New Brunswick	7%	3%
Quebec	25%	11%
Ontario	48%	31%
Manitoba	3%	2%
Saskatchewan	2%	1%
Alberta	8%	3%
BC	14%	5%
California	9%	3%
Hawaii	3%	0%
Washington State	3%	1%
Las Vegas	6%	1%
Florida	19%	8%
New York State	20%	10%
Other US states	28%	14%
UK/Europe	17%	9%
Caribbean/Mexico	18%	8%
Other Countries	10%	7%

Table 2 shows the places the THO theatre-goers visited for leisure purposes. As can be seen in this table, theatre-goers have a higher incidence of visitation to any destination than other THO residents (almost double for all of them except Ontario).

Experiences sought: When travelling, theatre-goers reveal themselves to be quite different than other THO residents. All of the 19 travel experiences listed in the next table are sought out more by THO theatre-goers than they are by other THO residents.

The experiences where the THO theatre-goers are significantly different than other THO residents are:

- Participate in a Hands-on Learning Experience
- Spiritual/Religious experience
- Experience the Good Life
- Experience City Life
- Visit Historic Sites and Important Places in History
- Spend Time with a Group of Good Friends
- Intimacy and Romance

Table 3: Experiences Sought while on Overnight Leisure Trips in Past 2 Years		
	THO Theatre Goers	Other THO Residents
Rest, Relax and Recuperate	69%	42%
Visit Friends/relatives who Live in Other Cities/countries	66%	35%
Spend Time with Family Away from Home	54%	30%
See Natural Wonders and Important natural Sites	45%	22%
Spend Time with a Group of Good Friends	45%	28%
Visit Historic Sites and Important Places in History	42%	19%
Experience Different Cultures and Ways of Life	35%	15%
Experience the Good Life (fine cuisine, good wine, being pampered)	34%	14%
Experience City Life (shopping, museums, nightlife)	34%	14%
Intimacy and Romance	33%	15%
Experience Unspoiled Nature	32%	17%
Escape the Winter Weather	32%	16%
Experience Adventure and Excitement	31%	18%
Be Someplace that Feels Familiar and Safe	27%	16%
Participate in a Hobby or Sport (e.g., golf, fishing)	26%	19%
Visit Casinos and Gamble	19%	13%
Visit a Popular/Trendy Place	18%	13%
Spiritual/Religious Experience	8%	3%
Participate in a hands-on Learning Experience (e.g., archaeological digs, cooking courses)	7%	2%

Cultural/entertainment activities participated in while on an overnight trip: As was the case with the travel experiences sought while on an overnight trip, THO theatre-goers have a higher incidence of participation in all cultural and entertainment activities than other THO residents.

Cultural tourists in general, and THO theatre-goers in particular, form one of the few market segments where the activities they participate in while at home are highly correlated to those they participate in when they travel. Namely, when THO theatre-goers travel they like to dine in "interesting" restaurants, shop, go to the theatre, art galleries and museums.

At the bottom of the activities that THO theatre-goers participate in while on an overnight trip are things such attending sporting events (professional or amateur) and aboriginal events or attractions. Although the low participation rate in "theatre festivals" while travelling may appear to contradict the fact that when at home

theatre-goers enjoy going to the theatre, this may simply be a function of the fact that the places which theatre-goers visited did not offer at that time any theatre festivals.

Table 4: Cultural/Entertainment Activities Participated in During Overnight Trips - Incidence of Participation 20% or Higher		
	THO Theatre Goers	Other THO Residents
Restaurant dining - regional or local cuisine	73%	41%
Read for relaxation on trip	66%	34%
Shop/browse - bookstores or music stores	61%	27%
Shop/browse - clothing/shoes/jewellery stores	59%	34%
Shop/browse - local arts & crafts	55%	21%
Visit natural wonders such as Niagara Falls	51%	26%
Movies	49%	23%
Local outdoor cafes	46%	19%
Shop/browse - antiques	45%	16%
Theatre	42%	10%
Art galleries	36%	9%
General history museums	34%	13%
Farmers' fairs or markets	33%	19%
Restaurant dining - internationally acclaimed	30%	12%
Shop/browse - retail gourmet foods	28%	13%
Zoos	28%	16%
Local festivals or fairs	27%	15%
Science/technology museums	26%	10%
Casinos	26%	19%
Recreational dancing	22%	8%
Botanical gardens	22%	9%
Historic sites such as the Acropolis, Fort Alamo	21%	7%
Prof'l baseball - spectator	20%	11%

How does one reach them? THO theatre-goers are avid readers of newspapers, both weekend and weekday editions. They also read community newspapers and the travel section of weekend newspapers. Late shows, such as movies on TV, evening drama and evening sitcoms are the shows most frequently watched on TV by THO theatre-goers. However, the incidence of TV watching is not as high as that of newspapers readership.

Table 5: Cultural/Entertainment Activities Participated in During Overnight Trips - Incidence of Participation Lower than 20%		
	THO Theatre Goers	Other THO Residents
Aquariums	19%	8%
Pick-your-own farms or participate in harvesting	17%	11%
French-Canadian cultural experience	17%	4%
Historical replicas of towns with re-enactment	17%	4%
Concerts - Rock & Roll/popular	17%	10%
Prof'l hockey - spectator	16%	9%
Amusement parks like Disneyland	16%	12%
Concerts - classical	15%	2%
Theatre festivals	14%	3%
Garden attractions such as Cypress Gardens	14%	5%
Ballet or other dance performances	13%	4%
Concerts - jazz	13%	2%
Amateur tournaments or competitions as spectator or participant	12%	7%
Movie theme parks like MGM studios	12%	8%
Science/technology theme parks like Epcot	11%	5%
Children's museums	10%	4%
International film festivals	9%	2%
Prof'l basketball - spectator	9%	3%
Opera	8%	2%
Musical festivals such as the Jazz festival in Montreal	8%	3%
Horse races	8%	5%
Planetariums	7%	3%
Carnivals such as Mardi Gras or Rio's de Janeiro's Carnival	7%	3%
Auto races - spectator	7%	5%
Literary festivals/events	6%	2%
Overnight Aboriginal cultural experience in a remote area	5%	2%
Aboriginal attractions, e.g., Indian Museum of North America	5%	1%
Prof'l football - spectator	4%	4%
National/international sports events such as the Olympics	3%	0%
Pfof'l figure-skating - spectator	2%	1%
Western theme events such as rodeos or the Calgary Stampede	2%	2%
Prof'l golf tournaments - spectator	2%	2%
Pow Wow/aboriginal celebration	2%	2%

Table 6: TV Shows Watched Regularly		
	THO Theatre Goers	Other THO Residents
Movies on TV	74%	72%
Evening drama	65%	54%
Evening sitcoms	61%	58%
Nature shows	59%	54%
Late evening news shows	57%	50%
Early evening news shows	56%	64%
News magazine shows	56%	43%
Professional sports events, such as golf, football, hockey, baseball or basketball	55%	59%
Instructional/hobby shows, such as gardening, fishing, woodworking, cooking	55%	48%
Other TV programs	47%	47%
Morning news shows	30%	37%
Daytime TV during weekdays, such as talk shows and soap operas	20%	31%

Almost half (44%) of the THO theatre-goers belong to the CAA club and over a third of them belong to a sports or fitness club. As such, these clubs represent cost-efficient alternatives to TV for reaching THO's theatre-goers.

Table 7: Publications Read Regularly		
	THO Theatre Goers	Other THO Residents
Daily newspaper	80%	68%
Weekend newspaper	83%	65%
Community newspapers	71%	57%
Weekend newspaper - travel section	61%	34%
News magazines, such as MacLean's, Time or Newsweek	52%	32%
Daily newspaper - travel section	49%	30%
Fashion magazines, such as Chatelaine, Vogue, Women's Day	47%	27%
Other magazines	44%	31%
Hobby magazines, such as Gourmet, Food & Wine, Gardening	41%	26%
Canadian/National Geographic	39%	22%
General interest magazine, such as New Yorker, Harper's	36%	13%
Other newspaper	33%	27%
Travel magazines (N.G. Traveller, Travel & Leisure, Conde Nast)	33%	17%
Sports magazines, such as Sports Illustrated, Golf Magazine, Sail	26%	21%

Table 8: Club Membership		
	THO Theatre Goers	Other THO Residents
Automobile club, such as CAA	44%	26%
Sports club, such as tennis club, golf club or fitness centre	33%	19%
Other organization	30%	17%
Nature organization, such as the Sierra Club	9%	4%
Art gallery or museum	8%	2%
Zoo or botanical garden	5%	1%
Gardening club	1%	1%
Do not belong to any organization	28%	51%

Table 9: Level of Education Completed		
	THO Theatre Goers	Other THO Residents
None	0%	1%
Elementary	1%	7%
Some secondary	6%	14%
Completed secondary/technical school	21%	28%
Some post-secondary education	0%	1%
Some trade-vocational	0%	1%
Trade-vocational diploma/certificate	2%	1%
Some college/CEGEP	5%	5%
Diploma of college/ CEGEP/nursing school	16%	16%
Some university	9%	5%
University diploma, level not specified	8%	4%
Bachelor's degree	22%	12%
University diploma above bachelor's but below master's	3%	1%
Master's degree	7%	3%
Degree in medicine, dentistry, veterinary	1%	0%
Earned Ph.D.	1%	0%

Education: THO theatre-goers have a significantly higher level of education than other THO residents - 42% of the THO theatre-goers have completed university, compared to 20% for other THO residents.

Household income: THO theatre-goers are also richer than other THO residents, perhaps a consequence of their higher education. On a pro-rated basis (i.e., excluding respondents' who did not know their household income or refused to reveal it), 51% of the theatre-goers have a household income of $60,000 and over, while only 31% of the other THO residents have a household income that falls in that range.

Gender: Compared to other THO residents, a higher proportion of THO theatre-goers are females.

Table 10: Gender		
	THO Theatre Goers	Other THO Residents
Male	46%	51%
Female	54%	49%

Table 11: Household Income		
	THO Theatre Goers	Other THO Residents
Under $20,000	7%	13%
$20K to < $40K	18%	21%
$40K to < $60K	17%	16%
$60K to < $80K	12%	11%
$80K to < $100K	10%	6%
$100,000 +	21%	6%
DK/Refuse	15%	26%

Table 12: Age Group of Respondent		
	THO Theatre Goers	Other THO Residents
18-20 Years	5%	6%
21-25 Years	8%	9%
26-30 Years	10%	12%
31-35 Years	12%	10%
36-40 Years	13%	14%
41-45 Years	12%	9%
46-50 Years	10%	8%
51-55 Years	8%	5%
56-60 Years	8%	6%
61-65 Years	4%	5%
66-70 Years	4%	4%
71-75 Years	3%	4%
76-80 Years	2%	4%
81and over	1%	3%

Age: There is not much difference in the age distribution of theatre-goers and other THO residents. The average age of THO theatre-goers is 43 years, while that of other THO residents is 44 years. When compared to other THO residents, theatre-goers have a higher concentration of their members in the 41-60 years age bracket (38% vs. 28%) and less in the 61 years and over bracket (14% vs. 20%).

Table 13: Number of People in Household		
	THO Theatre Goers	Other THO Residents
1 Member	12%	11%
2 Members	34%	28%
3 Members	19%	23%
4 Members	23%	23%
5 Members	9%	10%
6+ Members	3%	5%

In what type of households do they live in? THO theatre-goers live in households that are slightly smaller in size than those of other THO residents - 46% of the theatre-goers live in households of one or two members, while the corresponding figure for other THO residents is 39%.

They also have a higher incidence of households with no children aged 17 years or younger - 35% of theatre-goers live in households with children younger than 18, while 41% of other THO residents live in such households.

Table 14: Household Members under 18		
	THO Theatre Goers	Other THO Residents
1 Member	14%	19%
2 Members	16%	14%
3 Members	4%	6%
4+ Members	1%	2%

Table 15: Two-Income Households		
Spouse/partner works	THO Theatre Goers	Other THO Residents
Yes	46%	37%
No	18%	23%

A bit less than 74% of the THO theatre-goers work at a job or business, compared to 63% for other THO residents, and have a higher incidence of two-income households than other THO residents - 46% of the theatre-goers live in households where both spouses/partners work, as opposed to 37% for other THO residents.

Country of Birth: THO theatre-goers have a considerably higher proportion of Canadian-born members than other THO residents. A fact that could be easily attributed to issues related to language and the high level of concentration that watching a live theatre performance requires.

Table 16: Country of Birth		
	THO Theatre-Goers	Other THO Residents
Canada	60%	46%
U.K./Western & Northern Europe/Germany	7%	7%
Southern Europe	4%	11%
Central/Eastern Europe	4%	4%
United States	2%	1%
East Asia	6%	11%
Other Asia	5%	8%
Middle East	1%	1%
Caribbean/Central America	4%	5%
Africa	2%	2%
South America	3%	3%
Other country	1%	0%

PART 2: THE FUTURE

By the year 2026, the THO region is forecast to have 65% more residents aged 18 years or older than it did at the end of 1999. Those who would frequently or occasionally go to live theatre while not travelling are expected to increase by 77%, while other THO residents are expected to increase by 56%. As such, both the absolute and relative size of the theatre-goers will more than double. Those who go to live theatre on a frequent basis, while at home, are expected to increase over the same time period by 106%, from 367,053 in 1999 to 756,373 in 2026.

Table 17: THO Population in 2026 Residents Aged 18 Years or Older

Group\Year	1999	2026	Rate of Change
THO Theatre-goers	1,761,195	3,118,461	77%
Other THO residents	2,580,946	4,030,305	56%

Table 18: Activities Participated in At Home on a Frequent Basis by THO Theatre-Goers

	1999	2026	Rate of Change
Go to a park for a picnic/day outing	403,932	645,837	60%
Gardening	639,893	1,118,319	75%
Fishing	110,866	163,425	47%
Hunting	13,380	14,539	9%
Camping/hiking/backpacking	281,884	416,341	48%
Canoeing/kayaking	106,057	161,530	51%
Sailing/other boating	162,828	253,228	56%
Biking	348,653	505,444	45%
Cross-country skiing	49,607	84,133	70%
Downhill skiing/snowboarding	141,138	198,744	41%
Snowmobiling	33,963	36,834	8%
Ice-skating	255,864	348,480	36%
Golf	279,606	496,128	77%
Play racquet sports such as tennis	163,312	259,213	59%
Play team sports such as football	247,794	350,898	42%
Exercise at home/fitness centre	880,476	1,470,903	67%
Swim (pools/natural water bodies)	535,273	873,022	63%
Dancing	262,084	474,400	81%
Dine in restaurants (no fast food)	825,481	1,501,927	82%
Gamble at casinos	53,037	97,963	85%
Visit amusement or theme parks	124,536	198,125	59%
Go to professional sports events	202,485	348,435	72%
Go to a zoo or botanical garden	124,539	248,785	100%
Go to live theatre	367,053	756,373	106%
Go to the ballet	79,521	214,095	169%
Go to the opera	73,451	237,378	223%
Go to music concerts (all types)	268,813	580,348	115%
Go to an art gallery or art show	188,667	428,479	127%
Go to a museum	149,536	340,653	128%
Stay at a hotel/B&B in own town	59,238	75086	27%

As Table 18 shows, all other activities that the THO theatre-goers will engage in on a frequent basis while at home will increase. However, participation on a frequent basis in strenuous or outdoor activities is expected to increase at much lower rates than participation in less strenuous or cultural

Table 19: Places Visited for Overnight Leisure trips by THO Theatre-Goers			
	1999	2026	Rate of Change
Newfoundland	35,167	58,018	65%
PEI	71,587	121,750	70%
Nova Scotia	126,495	223,755	77%
New Brunswick	118,112	217,530	84%
Quebec	438,964	812,283	85%
Ontario	847,665	1,427,844	68%
Manitoba	60,229	108,677	80%
Saskatchewan	32,774	60,114	83%
Alberta	139,385	248,262	78%
BC	243,921	458,444	88%
California	162,934	263,196	62%
Hawaii	44,583	79,072	77%
Washington state	48,587	107,695	122%
Las Vegas	97,306	167,642	72%
Florida	326,308	590,656	81%
New York state	343,592	567,646	65%
Other US states	490,992	881,994	80%
UK/Europe	305,226	619,624	103%
Caribbean/Mexico	309,258	536,223	73%
Other Countries	171,383	371,913	117%

activities. In 2026, botanical gardens, live theatre, ballet, opera, music concerts, art galleries and museums will be much higher on the theatre-goers list of frequent activities to do on a day-to-day basis than they were in 1999.

Compared to 1999, in 2026 more THO theatre-goers will be visiting each and every one of the destinations listed in Table 19. However, in relative terms their interest in New Brunswick, Quebec, Saskatchewan, BC, Florida, Washington State, UK/Europe and "other countries" as destinations for overnight leisure trips will increase in 2026. On the other hand, interest in places such as Ontario, PEI, Newfoundland, California and New York State will decline[2].

The average age of the THO theatre-goers will increase by 14% from 43 years in 1999 to 49 years in 2026. The proportion of those aged 51 years and over will increase substantially compared to 1999.

[2] There are a number of reasons why some destinations become, in relative terms, more important to the theatre-goers than others. Firstly, the relative rise and fall of destinations is related to the differential growth in the theatre-goers' interests. For example, golfing, skiing and gambling do not grow as fast as the theatre-goers' numbers. As such destinations such as Las Vegas, Alberta, and PEI that offer gambling, skiing and golfing, respectively, decline in relative importance. Secondly, for destinations that are visited by only a few theatre-goers, such as Saskatchewan, Manitoba and Hawaii, these results may just reflect their small sample size. As such caution is recommended in interpreting numbers related to small destinations. Finally, some destinations rise in importance because the cultural mix of the theatre-goers would change. For example, while in 1999, 60% of the theatre-goers were born in Canada, in 2026, this number will decline to 57%. Theatre-goers born in Central/Eastern Europe would increase their size from 4%, in 1999 to 9% in 2026. As such, Europe would increase its relative importance as a destination for theatre-goers as they travel back home to visit among other things, their friends and relatives.

Table 20: Age Group of THO Theatre-Goers			
	1999	2026	Rate of Change
18-20 Years	89,090	110,856	24%
21-25 Years	141,348	179,004	27%
26-30 Years	174,720	224,175	28%
31-35 Years	216,297	278,925	29%
36-40 Years	224,310	289,548	29%
41-45 Years	205,246	233,731	14%
46-50 Years	181,637	310,805	71%
51-55 Years	139,406	294,726	111%
56-60 Years	140,734	394,912	181%
61-65 Years	78,133	244,895	213%
66-70 Years	62,000	154,328	149%
71-75 Years	49,705	144,497	191%
76-80 Years	41,303	195,742	374%
81and over	17,267	62,318	261%

Although the absolute number of THO theatre-goers with children less than 18 years of age will increase over the period under consideration by 27%, the proportion of theatre-goers households with children less than 18 years of age will decline from 35% in 1999 to 25% in 2026.

All types of travel experiences sought by THO theatre-goers when on overnight trips will increase in 2026. However, some of them will increase by more than the growth of the theatre-goers and therefore their market share within this group would increase. These experiences are:

- Be Someplace that Feels Familiar and Safe, and
- Participate in a hands-on Learning Experience (archaeological digs, cooking)

Similarly, while all cultural/entertainment activities that theatre-goers participate in while on an overnight trip will increase in 2026, some activities will increase by more than the growth of this market segment and therefore their market share within theatre-goers will increase. The top 10 of these activities are (in rank order, see tables 23 and 24):

1. Go to the opera
2. Go to the horse races
3. Visit garden attractions
4. Attend concerts - classical
5. Carnivals such as Mardi Gras or Rio's
6. Attend theatre festivals
7. Attend ballet/dance performances
8. Visit local festivals or fairs
9. Visit historical town with re-enactments
10. Visit botanical gardens

Table 21: THO Theatre-Goers Households with Members Under 18		
# of Members under 18	1999	2026
1 Member	14%	10%
2 Members	16%	11%
3 Members	4%	3%
4+ Members	1%	1%

Table 22: Experiences Sought by Theatre Goers while on Overnight Leisure Trips	
	Rate of Change 2026 over 1999
Rest, Relax and Recuperate	66%
Visit Friends/relatives who Live in Other Cities/countries	58%
Spend Time with Family Away from Home	70%
Intimacy and Romance	43%
Experience Different Cultures and Ways of Life	73%
Visit Historic Sites and Important Places in History	75%
Spend Time with a Group of Good Friends	61%
See Natural Wonders and Important natural Sites	66%
Experience the Good Life (fine cuisine, good wine, being pampered)	60%
Visit Casinos and Gamble	69%
Visit a Popular/Trendy Place	49%
Be Someplace that Feels Familiar and Safe	81%
Experience Adventure and Excitement	48%
Experience City Life (shopping, museums, nightlife)	62%
Escape the Winter Weather	73%
Experience Unspoiled Nature	56%
Participate in a Hobby or Sport (e.g., golf, fishing)	58%
Participate in a hands-on Learning Experience (e.g., archaeological digs, cooking courses)	99%
Spiritual/Religious Experience	56%

Although all of the outdoor activities that theatre-goers participate in while on an overnight trip would increase in 2026, they will almost all increase by less than the growth of their numbers. The outdoor activities that will increase by more than the growth of THO theatre-goers are (in rank order - there is no statistical table is shown):

1. Curling
2. Heli-skiing
3. Motorcycling as an overnight touring trip
4. Fishing in salt water

Table 23: Cultural/Entertainment Activities Participated in During Overnight Trips[3]	
	Rate of Change- 2026 over 1999
Opera	118%
Horse races	100%
Garden attractions such as Cypress Gardens	99%
Concerts - classical	94%
Carnivals such as Mardi Gras or Rio's de Janeiro's Carnival	93%
Theatre festivals	83%
Ballet or other dance performances	82%
Local festivals or fairs	81%
Historical replicas of towns with re-enactment	81%
Botanical gardens	80%
National/international sports events such as the Olympics	79%
Farmers' fairs or markets	79%
Western theme events such as the Calgary Stampede or rodeos	78%
General history museums	77%
Art galleries	77%
Prof'l football - spectator	77%
Science/technology museums	75%
Pick-your-own farms or participate in harvesting	73%
Casinos	73%
Pow Wow/aboriginal celebration	73%
Planetariums	73%
Theatre	72%
Prof'l figure skating - spectator	72%
Historic sites such as the Acropolis, Fort Alamo	71%
Shop/browse - antiques	70%

[3] Activities with growth rates equal to 77% will maintain their market shares. Activities with growth rates greater than 77% will increase their market shares, while those with growth rates less than 77% will see their market shares within the theatre group decline.

Table 24: Cultural/Entertainment Activities Participated in During Overnight Trips	
	Rate of Change 2026 over 1999
Shop/browse - local arts & crafts	68%
Prof'l baseball - spectator	68%
Zoos	67%
Shop/browse - bookstores or music stores	67%
Natural wonders such as Niagara Falls	66%
Local outdoor cafes	66%
Restaurant dining - regional or local cuisine	66%
Read for relaxation on trip	66%
Shop/browse - clothing/shoes/jewellery stores	64%
Movies	64%
Restaurant dining - internationally acclaimed	63%
Amusement parks like Disneyland	63%
Shop/browse - retail gourmet foods	63%
Aquariums	60%
Prof'l ice hockey - spectator	60%
Prof'l basketball - spectator	59%
Science/technology theme parks like Epcot	58%
Recreational dancing	58%
Amateur sports/arts/hobby tournaments or competitions as spectator or participant	57%
Musical festivals such as the Jazz festival in Montreal	57%
Overnight Aboriginal cultural experience in a remote area	56%
Literary festivals/events	56%
Concerts - jazz	55%
Prof'l golf tournaments - spectator	55%
International film festivals	55%
Movie theme parks like MGM studios	52%
Auto races - spectator	51%
French Canadian cultural experience	50%
Aboriginal attractions such as the Indian Museum of North America	48%
Musical attractions such as Jazzland	40%
Concerts - rock & roll/popular	38%
Children's museums	36%